



Tuesday, July 12, 2016

The Probate Examiner's Office recommends approval of the following Probate matters:

12	15CEPR01242	Reginald D. Mehling (Estate)
20	16CEPR00584	Ameliafrances Paul Living Trust

The following cases have been taken off calendar:

3	12CEPR00375	Aiyanna Katigbak (GUARD/PE)
10	15CEPR00842	William George Bongardt (Estate)
19	16CEPR00575	Mauricia Yanez (Det. Succ)

Appearance of counsel is recommended for all remaining matters set for hearing. Thank you.

Dept. 303, 9:00 a.m. Tuesday, July 12, 2016

1 Cain Blanco, Trinity Blanco and Vanity Blanco (GUARD/P)**Case No. 11CEPR00659**

Petitioner: Oriana S. Blanco (pro per)

Guardian: Rosemary Blanco (pro per)

Petition for Termination of Guardianship

		ORIANA S. BLANCO , mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS: Continued from 12/8/15. Minute order states continued for the Court investigator to re-interview the parties and provide the Court with an updated recommendation after additional time as passed. 1. The proofs of service for the guardian, the grandparents and the minors does not include the name and address of the person serving the notices. The proof of service does include a signature but the signature is illegible.
		ROSEMARY BLANCO , paternal grandmother, was appointed guardian on 1/15/13. Please see petition for details.	
Cont. from 081815, 091515, 102015, 120815		Court Investigator Report filed 8/11/15	
<input type="checkbox"/>	Aff.Sub.Wit.	Court Investigator Supplemental Report filed 7/6/16	
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input checked="" type="checkbox"/>	Pers.Serv.	W/	
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: KT
			Reviewed on: 7/5/16
			Updates:
			Recommendation:
			File 1 – Blanco

DOD: 11/18/2010	BEVERLY T. ADAMS , spouse, was appointed Executor with full IAEA authority without bond on 06/25/2012.	NEEDS/PROBLEMS/COMMENTS:
	Letters issued on 06/28/2012.	
	Inventory and Appraisal was due 10/26/2012.	Minute Order of 12/08/2015: Counsel requests six months.
Cont. from 072613, 110813, 112414, 120914, 060215, 120815	Status Report and Request for Continuance filed 07/11/2016	
Aff.Sub.Wit.	states Beverly T. Adams needed to be appointed as Personal Representative of her late husband's estate in order to file a wrongful death lawsuit on his behalf stemming from an airplane crash in Florida on 11/17/2010. The lawsuit was filed in Florida Southern District Court on 05/14/2013, Case No. 2:13-cv-14206. On 05/19/2015, the judge dismissed the case and Plaintiff's counsel in the litigation matter filed a Motion for Reconsideration or to Alter and Amend Judgment. The Judge however denied the Motion for Reconsideration on 03/23/2016. The Plaintiffs' counsel since has filed an Appeal with the U.S. Court of Appeals, 11 th Judicial Circuit in Atlanta, Georgia. The Plaintiffs' counsel received an Acknowledgment of Appeal on 06/01/2016 with Appeal No. 16-12963-F, and a telephone mediation that is to be held on 07/20/2016. Plaintiffs' counsel was not able to estimate a time frame for when a court date will be set for the Appeal in order to provide this Court with a time frame for filing the I&A or petition to close this estate.	1. Need Inventory and Appraisal and First Account or Petition for Final Distribution.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt	An Inventory and Appraisal is not needed at this time as there is currently no real or personal property to be appraised. The sole probate asset at issue is the potential recovery in the litigation matter. In the event that the appeal and subsequent trial is resolved in favor of the decedent, the Personal Representative will file and Inventory and Appraisal at that time, as the decedent has no other property subject to probate. It is respectfully requested that this probate matter be continued two years resolution of the appeal and eventually a resolution of wrongful death litigation.	
CI Report		Reviewed by: LV
9202		Reviewed on: 07/06/2016
Order		Updates: 07/11/2016
Aff. Posting		Recommendation:
Status Rpt		File 2 – Adams
UCCJEA		
Citation		
FTB Notice		

Attorney Melinda Bell, of San Juan Capistrano (for Guardian Jana Keeley)

Probate Status Hearing Re: Proof of Funds in a Blocked Account

		JANA KEELEY , mother, was appointed as Guardian of the Estate on 9/15/2015, with deposits of \$151,118.83 of life insurance proceeds and funds in an IRA into a blocked account at Fresno County Federal Credit Union.	NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR <i>Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account</i> filed 2/10/2016 and 7/7/2016.
Cont. from 121515, 021616, 051716, 062116		Letters of Guardianship issued on 10/5/2015.	
Aff.Sub.Wit.		Minute Order dated 9/15/2015 from the hearing on the petition for appointment of guardian set this status hearing on 12/15/2015 for filing of proof of funds deposited into a blocked account.	Continued from 6/21/2016. <i>Minute Order</i> states Wells Fargo is ordered to transfer all funds into the blocked account forthwith. Also, the Court orders Molly Miller or a representative who has the authority to transfer funds to be personally present or by CourtCall on 7/12/2016 if funds have not been transferred by 7/8/2016. Decedent's name is Emerson Katigbak, Account Number [omitted.] Note: <i>Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account</i> filed 2/10/2016 shows funds deposited of \$149,753.11 . Court requested receipt for the additional funds of \$1,365.72 in order to demonstrate total deposit of \$151,118.83 as ordered. <i>Receipt and Acknowledgment of Order for the Deposit of Money Into Blocked Account</i> filed 7/7/2016 shows funds deposited of \$148,834.70 . <i>Declaration of Melinda S. Bell Regarding Deposit to Blocked Account</i> filed 7/8/2016 explains the discrepancy.
Verified			
Inventory			
Blocked Recpt.	X	Minute Order dated 12/15/2015 from the status hearing for proof of funds placed in blocked account states counsel represents that an insurance check was received and deposited last night, but they are still waiting on an additional check from Wells Fargo; requests a continuance. Matter continued to 2/16/2016.	
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.		Inventory and Appraisal Partial No. 1 filed 2/2/2016 shows funds deposited into a blocked account totaling \$149,753.11 .	
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order		Declaration of Melinda S. Bell Regarding Deposit to Blocked Account filed 7/8/2016 states, in most pertinent part: The Present Balance is less than the amount shown in the Receipt and Acknowledgment of Order for the Deposit of Money into Blocked Account filed 2/10/16 (\$149,753.11). The Court authorized an Order for Withdrawal of Funds of \$5,920.00 from Blocked Account on 10/20/15. The Present Balance indicated is calculated as follows: Initial Deposit (filed 2/10/16) \$149,753.11; Second Deposit (filed 7/7/16) \$4,173.30; total Deposits \$153,926.41; Withdrawal (filed 10/20/15) \$5,290.00; Difference (Positive) w Present Balance (filed 7/7/16) \$148,834.70; the difference of \$198.29 is attributable to interest earned in the Blocked Account.	
Aff. Posting			
Status Rpt			
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: LEG
			Reviewed on: 7/6/16
			Updates: 7/11/16
			Recommendation:
			File 3 – Katigbak

4 Sergio Regino Guerrero (GUARD/P)

Petitioner Ayala, Susannha (Pro Per – Mother)

Case No. 12CEPR01066**Petition for Termination of Guardianship**

		SUSANNHA AYALA , mother, is petitioner. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS: Minute Order of 05/31/2016: Examiner notes provided in open Court. 1. Need Notice of Hearing. 2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment for Termination of Guardianship for: <ul style="list-style-type: none">• Maria Luisa Rodriguez (co-guardian)• Aciano Chano Rodriguez (co-guardian)• Mateo Guerrero (Father)• Regino Guerrero (Paternal Grandfather)• Paternal Grandmother (not listed)• Jose L. Ayala (Maternal Grandfather)• Maria Ayala (Maternal Grandmother)	
Cont. from 053116				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			x
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: LV				
Reviewed on: 07/06/2016				
Updates:				
Recommendation:				
File 4- Guerrero				

5A Gary F. Morris, Sr., 2013 Trust**Case No. 13CEPR01104**

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr., Beneficiary)

Attorney Jennifer Walters (for Walter A. Morris, Successor Trustee)

Petition to Compel Accounting by Trustee of the Gary F. Morris, Sr. 2013 Trust and Petition for Distribution of Trust Assets to Doug Standing, Trustee of the Gary Morris, Jr. Trust and Petition for Fees and Costs

DOD: 10/19/2013	GARY MORRIS, JR., Beneficiary, is Petitioner.		NEEDS/PROBLEMS/COMMENTS: <u>Page 5B</u> is a Fee Waiver Review.
	Petitioner states:		Continued from 5/31/2016. Minute Order states Ms. Walters is unsure whether or not what has been provided is acceptable to Ms. LeVan. The Court is aware of a late-filed status report that was not reviewed for today's hearing. [Court records do not show an accounting has been filed as of 7/6/2016.]
	<ul style="list-style-type: none"> WALTER A. MORRIS was appointed as Successor Trustee of the GARY F. MORRIS, SR., 2013 TRUST on 4/1/2014 [copy of Trust attached as Exhibit A to Declaration of Clerical Error and Omissions filed 10/2/2015]; 		
Cont. from 100615, 111715, 010516, 020916, 031516, 050316, 053116	<ul style="list-style-type: none"> The GARY F. MORRIS, SR., 2013 TRUST terms provide that the balance of the Trust estate, including all assets poured into the Trust as a result of Trustor's death, is to be distributed to BARBARA TURNER, Trustee of the GARY F. MORRIS, JR., TRUST; 		Notes for background:
<input type="checkbox"/> Aff.Sub.Wit.	<ul style="list-style-type: none"> BARBARA TURNER resigned as Trustee of both Trusts, and WALTER A. MORRIS was appointed as Successor Trustee; 		
<input checked="" type="checkbox"/> Verified	<ul style="list-style-type: none"> Petitioner requests the Court compel WALTER A. MORRIS, as Trustee of the GARY F. MORRIS, SR., 2013 TRUST, to distribute the remaining assets in the GARY F. MORRIS, SR., 2013 TRUST to DOUG STANDING, Trustee of the GARY F. MORRIS, JR., TRUST within 30 days of the order approving this petition; 		<ul style="list-style-type: none"> Minute Order dated 5/3/2016 from a previous hearing states Ms. Walters called the Court this morning to advise of her inability to appear today; her office asked Ms. LeVan to request a continuance. Minute Order dated 3/15/2016 from a previous hearing states counsel is in disagreement as to what has been provided. If all of the information has not been provided by 5/3/2016, then Walter Morris is ordered to be personally present or present via CourtCall on 5/3/2016. Walter Morris did not appear in Court. Minute Order dated 1/5/2016 from the a previous hearing states Ms. Walters represents that there have been continued difficulties in obtaining the bank statements, but the accounting is otherwise completed and ready for filing. Ms. LeVan agrees to the accounting being filed without the missing statements; Ms. Walters will proceed with the filing.
<input type="checkbox"/> Inventory	~Please see additional page~		
<input type="checkbox"/> PTC			
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			
<input checked="" type="checkbox"/> Aff.Mail			
<input type="checkbox"/> Aff.Pub.			
<input type="checkbox"/> Sp.Ntc.			
<input type="checkbox"/> Pers.Serv.			
<input type="checkbox"/> Conf. Screen			
<input type="checkbox"/> Letters			
<input type="checkbox"/> Duties/S			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			
			Reviewed by: LEG
			Reviewed on: 7/6/16
			Updates:
			Recommendation:
			File 5A – Morris

5A

Petitioner states, continued:

- **GARY F. MORRIS, SR., 2013 TRUST** terms provide that the Trustee shall periodically, but not less than once each year, render an account of its administration of the Trust(s) under the Trust instrument to all current income beneficiaries;
- **GARY F. MORRIS, SR's.**, date of death is 10/9/2013 [sic]; **WALTER A. MORRIS** was appointed as Successor Trustee on 4/1/2014; to date, no accounting has been received from **WALTER A. MORRIS**.

Petitioner prays the Court Order:

1. An accounting from **WALTER A. MORRIS** from the period when he was Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** from 4/1/2014 until 8/31/2015;
2. **WALTER A. MORRIS**, Successor Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**, [shall] distribute all of the remaining assets in the **GARY F. MORRIS, SR., 2013 TRUST** to **DOUG STANDING**, Trustee of the **GARY F. MORRIS, JR., TRUST** within 30 days of the signed of the order approving this *Petition*;
and
3. Allowing attorney fees and costs to Petitioner to be paid by Walter Morris for failure to file accounting and distribute assets pursuant to **GARY F. MORRIS, SR., 2013 TRUST** terms.

Notes:

- Filing fee of **\$435.00** is currently due from Petitioner, who filed the *Petition* using a fee waiver, which is pending. The **\$435.00** filing fee is appropriately payable from Trust assets. *Declaration of Clerical Error and Omissions* filed 10/2/2015 states Petitioner agrees that a filing fee should be paid by Walter Morris, Trustee of the **GARY F. MORRIS, SR., 2013 TRUST**; however, Walter Morris is not communicating with the beneficiary, Gary Morris, Jr., his attorney, nor the Successor Trustee of the **GARY F. MORRIS, JR., TRUST**; the beneficiary has no access to funds of the Trust.
- *Order Setting Bond Amount* filed 4/25/2015 set bond at **\$286,000.00**, proof of which was filed on 5/9/2014. *Order Reducing Bond Amount* filed 5/13/2015 finds that the bond amount for **WALTER A. MORRIS**, as Trustee of the **GARY F. MORRIS, SR., 2013 TRUST** is reduced to **\$152,137.88**, which is the amount of net proceeds [distributed to the seller of the Trust real property] plus **10%**.
- *Declaration of Clerical Error and Omissions* filed 10/2/2015 attaches as *Exhibit B* a copy of the Bond renewal that was mailed to Walter Morris, and states it is unknown what Walter Morris did with it.
- *Order on Ex Parte Petition for Payment of Allowance to Gary Morris, Jr. for Housing Pursuant to Article 2, Section 2.04(D) of the Gary Morris, Sr. Revocable Trust dated 9/3/2013* filed on 1/29/2016 was withdrawn and dismissed on 3/10/2016.

Attorney Nancy J. LeVan (for Petitioner Gary Morris, Jr.)

Fee Waiver Review

DOD: 10/19/2013		NEEDS/PROBLEMS/COMMENTS: <u>Continued from 5/31/2016.</u>
Cont. from 100615, 111715, 010516, 020916, 031516, 050316, 053116		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LEG
		Reviewed on: 7/6/16
		Updates:
		Recommendation:
		File 5B – Morris

5B

Petition for Transfer

		<p>EVANGELINE FERNANDEZ, Mother, and LAURA RUDD, Sister, were appointed Co-Conservators of the Person on 5/29/14.</p> <p>COURT INVESTIGATOR filed this Petition for Transfer on 5/25/16. Notice of Hearing was mailed to the Co-Conservators, their attorney, and the Conservatee on 5/25/16.</p> <p>Petitioner states the Co-Conservators and the Conservatee currently reside in Irvin, CA; therefore, Orange County is the appropriate venue pursuant to Probate Code §2215.</p> <p>The petition recommends that fees and costs related to the transfer be waived.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Note: The Court will set a status hearing for the receipt of the file by Orange County Superior Court as follows:</p> <ul style="list-style-type: none"> • Tuesday, January 10, 2017
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: skc</p> <p>Reviewed on: 7/6/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 6- Fernandez</p>	

Attorney Eric R. Brown, of Carmichael (for Petitioner Lee X. Yang, Administrator)
 Attorney Marvin T. Helon (Court-appointed Guardian ad Litem for minor beneficiaries)
 Attorney William C. Seiffert, of Citrus Heights (for Jason Yang, Claimant)

Probate Status Hearing Re: Agreement to Sell the Property

DOD: 1/16/2014		<p>LEE X. YANG, nephew, was appointed Administrator with Full IAEA Authority without bond on 7/7/2014. Letters issued on 7/23/2014.</p> <p>First Account and Report of Status Administration was filed 9/18/2015, subsequent to the filing of a <i>First and Final Report of Administrator on Waiver of Account, etc.</i>, on 3/9/2015.</p> <p>Minute Order dated 6/7/2016 from the last hearing on the First Account set this matter for status on 7/12/2016 and states: Mr. Brown will be filing an amended petition. The Court indicates that if the property is sold, the Court will order that any net proceeds are to be placed into a blocked account. On 7/12/2016, the Court will consider the issues of bond and limited authority, as well as set status hearings.</p> <p>Supplemental Report of Status of Administration filed 7/5/2016.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need amended final account.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input checked="" type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: LEG</p> <p>Reviewed on: 7/6/16</p> <p>Updates: 7/8/16</p> <p>Recommendation:</p> <p>File 7- Lee</p>	

8 Neveah Musgrave & Lillie Musgrave (GUARD/P) Case No. 14CEPR01146

Guardian Musgrave, Leon (Pro Per)

Probate Status Hearing RE: Proof of Guardianship in Ohio

Neveah Age: 9	LEON MUSGRAVE , maternal great-grandfather was appointed guardian on 02/24/2015.	NEEDS/PROBLEMS/COMMENTS:
Lillie Age: 8		
Cont. from	Order Fixing Residence Outside of the State of California was granted on 11/10/2015 allowing the petitioner to move to the state of Ohio.	
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg	A Status Hearing regarding Proof of Establishment of Guardianship in Ohio was set for 04/12/2016.	
Aff.Mail	Minute Order of 04/12/2016: states there was no appearances. The Court issues an Order to Show Cause to Leon Musgrave as to why he should not be removed as guardian for failure to establish a guardianship in Ohio and failure to be present today. Leon Musgrave is ordered to be personally present or present via CourtCall on 05/24/2016.	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections	Minute Order of 05/24/2016: The Order to Show Cause is vacated. Counsel represents that a hearing in Ohio is set for 07/06/2016. The Court admonishes that paper proof of the guardianship must be filed.	
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 07/07/2016
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 8- Musgrave

Probate Status Hearing RE: Filing of the Inventory and Appraisal

DOD: 11/27/2014	ZEPURE "ZEPPY" ATTASHIAN , attorney and named executor, was appointed Executor with full IAEA without bond on 11/12/2015. <i>Letters issued 11/16/2015.</i>	NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u> Final I&A filed 6/27/2016.</p>
Cont. from 041916, 053116		
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory		
<input checked="" type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: SEF Reviewed on: 7/6/2016 Updates: Recommendation: File 10- Bongardt

Petitioner Castillo, Valerie (Pro Per – maternal aunt)

Petition for Appointment of Guardian of the Person

		TEMPORARY EXPIRES 01/26/16; extended to 3/22/2016; extended to 4/19/2016; extended to 5/31/2016; extended to 7/12/2016	NEEDS/PROBLEMS/COMMENTS:
Cont. from 120115, 020216, 032216, 041916, 053116		VALERIE CASTILLO, maternal aunt, is Petitioner.	Continued from 5/31/2016. Minute Order states the Court finds due diligence as to Byron Tokumoto, and parties represent that the paternal grandparents of Ryan are both deceased. Matter is continued for notice as to Will Bailey, father of Zoe, and Will Bailey, paternal grandfather of Zoe. The Court admonishes that parties should never bring a minor to court.
	Aff.Sub.Wit.		
✓	Verified	Objection to Guardianship filed 10/22/15 by Patricia Castillo.	
	Inventory		
	PTC	Court Investigator filed a report on 11/23/15.	
	Not.Cred.		
✓	Notice of Hrg	Declaration of Patricia Castillo filed 11/25/15.	The following defects from the last hearing remain:
✓	Aff.Mail	w /	1. Need proof of service 15 days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Guardian of the Person or Consent & Waiver of Notice, or Declaration of Due Diligence, for:
	Aff.Pub.		a. Will Bailey, Zoe's father;
	Sp.Ntc.		b. Will Bailey, Zoe's paternal grandfather.
✓	Pers.Serv.	w /	
✓	Conf. Screen		Note for background: Minute Order dated 2/2/2016 from a previous hearing states, in pertinent part, that the Court orders that all visits are to be supervised by Valerie Castillo.
✓	Letters		
✓	Duties/Supp		
✓	Objections		
	Video Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
			Reviewed by: JF / LEG
			Reviewed on: 7/6/16
			Updates:
			Recommendation:
			File 11 – Tokumoto/Bailey/Castillo

Waiver of Accounting and Report of Executor and Petition for Its Settlement; Waiver of Executor's Commissions; for Allowance of Attorney's Fees for Ordinary Services, for Costs Reimbursement, and for Final Distribution

DOD: 11/30/15		KAREN SIMS , Executor with Full IAEA without bond, is Petitioner. Accounting is waived I&A: \$266,500 POH: \$266,500 (real property plus two vehicles) Executor waives statutory compensation Attorney (Statutory): \$8,330.00 Costs: \$435.00 (filing) Distribution pursuant to Decedent's will and agreement between heirs: Karen Sims: A 50% interest in the real property in vehicles Daniel Mehling: A 50% interest in the real property in vehicles	NEEDS/PROBLEMS/COMMENTS:				
<input checked="" type="checkbox"/>	Aff.Sub.Wit.						
<input checked="" type="checkbox"/>	Verified						
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	Objections						
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<table border="1"> <tr><td>Reviewed by: skc</td></tr> <tr><td>Reviewed on: 7/6/16</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation: SUBMITTED</td></tr> <tr><td>File 12- Mehling</td></tr> </table>			Reviewed by: skc	Reviewed on: 7/6/16	Updates:	Recommendation: SUBMITTED	File 12- Mehling
Reviewed by: skc							
Reviewed on: 7/6/16							
Updates:							
Recommendation: SUBMITTED							
File 12- Mehling							

Petition for Attorney Fees, for Reimbursement of Fees Advanced, and for Termination of Services of Attorney

			FLORA ISTANBOULIAN is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner does not appear make any allegations re ability of the conservatorship estate to pay the requested compensation. The Court may require clarification. <u>Note:</u> Letters issued to the Public Guardian on 5/24/16; I&A has not yet been filed. The original petition estimated the conservatorship estate at approx. \$5,000 in personal property plus annual income of \$33,178.80. <u>Note:</u> Status hearing is set for 9/12/16 for the PG to file the I&A.
			Petitioner was court appointed to represent the Conservatee on 1/27/16.	
			Pursuant to stipulation, the Fresno County Public Guardian was appointed Conservator of the Estate only on 5/9/16.	
	Aff.Sub.Wit.		Petitioner requests fees in connection with the representation of the Conservatee for the petition to appoint a conservator of the person and estate. Petitioner requests that she be paid \$4,957.50 plus \$435.00 filing fee from the conservatorship estate for 19.83 hours @ \$250/hr. Services include review of file and medical records, speaking with County Counsel and Public Guardian, visits with client, conference calls, meetings, appearance at hearings, review of stipulation for settlement, as itemized in petition.	
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202		1. Approving compensation of \$4,957.50 plus \$435.00 for filing;	
✓	Order		2. That her services as attorney of record for the Conservatee are terminated; and	
	Aff. Posting		3. Such other relief that the Court considers proper.	
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: skc
				Reviewed on: 7/5/16
				Updates:
				Recommendation:
				File 13- Tashjian

Petitioner: Courtney Nicole Hoover (Pro per)

Petitioner: Hopie Marie Varela (Pro per)

Petition for Appointment of Guardian of the Person (for Ehli Chapel only)

		<u>NO TEMPORARY (not requested)</u>	NEEDS/PROBLEMS/COMMENTS:
		COURTNEY HOOVER and HOPIE VARELA,	This petition is as to <u>Ehli</u> only.
		friends of mother, are petitioners and request	Minute order dated 4/6/2016
		appointment as co-guardians of the person	continued matter to 5/11/2016
		of Ehli Chapel only	for service of the biological
Cont. from 040616, 051116			father, Robert Campos, and the
	Aff.Sub.Wit.		paternal grandparents.
✓	Verified		Courtney Hoover (petitioner)
	Inventory		was to bring paper proof to the
	PTC		5/11/2016 hearing re: her two
	Not.Cred.		warrants being cleared.
	Notice of Hrg	x	Minute order dated 5/11/2016
	Aff.Mail	x	continued matter to 7/12/2016.
	Aff.Pub.		The following issues still exist:
	Sp.Ntc.		1. Need proof of personal service
	Pers.Serv.	x	15 days before hearing of
✓	Conf. Screen		<i>Notice of Hearing</i> with copy of
✓	Letters		petition <u>or</u> consent and waiver
✓	Duties/Supp		of notice for:
	Objections		a. Robert Campos (biological
	Video Receipt		father) – <i>unless court</i>
✓	DSS Report		<i>dispenses with notice</i>
	9202		2. Need proof of mailed service
✓	Order		15 days before hearing of
			<i>Notice of Hearing</i> with copy of
			petition <u>or</u> consents and
			waivers of notice:
			a. Paternal grandfather –
			<i>unless court dispenses with</i>
			<i>notice</i>
			b. Paternal grandmother -
			<i>unless court dispenses with</i>
			<i>notice.</i>
			See additional page.
	Aff. Posting		Reviewed by: SEF
	Status Rpt		Reviewed on: 7/6/2016
✓	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 14A- Chapel

NEEDS/PROBLEMS/COMMENTS, *continued*:

3. Petition lists address of proposed co-guardians, Courtney Hoover and Hopie Varela at: 3221 Lee Street in Selma. However, Courtney Hoover filed recent papers in this case file indicating her address is now: 504 E. Andrews. Need clarification as to current address.
4. Per item 3 above, may need revised *Orders* and *Letters* reflecting the current address of petitioners.

Petitioner: Christina Padilla (Pro per)

Petition for Appointment of Guardian of the Person (for Mikko Padilla only)

		NO TEMPORARY (not requested)	NEEDS/PROBLEMS/COMMENTS:	
		CHRISTINA PADILLA , friend of mother, is petitioner and requests appointment as guardian of the person of Mikko Padilla only. <i>See petition for details.</i>	This petition is as to <u>Mikko</u> only. Please see competing petition filed by Courtney Hoover (as to Mikko) on page 14C. Minute order dated 4/6/2016 continued matter to 5/11/2016 for service of the biological father, Robert Campos, and the paternal grandparents. [Minute order indicates that Petitioner, Christina Padilla, was not present.] Minute order dated 5/11/2016 continued matter to 7/12/2016, and the following issues still exist: 5. Need proof of personal service 15 days before hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consent and waiver of notice for: a. Robert Campos (father) – <i>unless court dispenses with notice</i> 6. Need proof of mailed service 15 days before hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: a. Paternal grandfather b. Paternal grandmother	
Cont. from 040616, 051116				
<input type="checkbox"/>	Aff.Sub.Wit.			
<input checked="" type="checkbox"/>	Verified			
<input type="checkbox"/>	Inventory			
<input type="checkbox"/>	PTC			
<input type="checkbox"/>	Not.Cred.			
<input type="checkbox"/>	Notice of Hrg			X
<input type="checkbox"/>	Aff.Mail			X
<input type="checkbox"/>	Aff.Pub.			
<input type="checkbox"/>	Sp.Ntc.			
<input type="checkbox"/>	Pers.Serv.			X
<input checked="" type="checkbox"/>	Conf. Screen			
<input checked="" type="checkbox"/>	Letters			
<input checked="" type="checkbox"/>	Duties/Supp			
<input type="checkbox"/>	Objections			
<input type="checkbox"/>	Video Receipt			
<input checked="" type="checkbox"/>	DSS Report			
<input type="checkbox"/>	9202			
<input checked="" type="checkbox"/>	Order			
<input type="checkbox"/>	Aff. Posting			
<input type="checkbox"/>	Status Rpt			
<input checked="" type="checkbox"/>	UCCJEA			
<input type="checkbox"/>	Citation			
<input type="checkbox"/>	FTB Notice			
			Reviewed by: SEF	
			Reviewed on: 7/6/2016	
			Updates:	
			Recommendation:	
			File 14B- Padilla	

Petitioner: Courtney Nicole Hoover (Pro per)

Petition for Appointment of Guardian of the Person (for Mikko Padilla only)

		<u>NO TEMPORARY (not requested)</u>	NEEDS/PROBLEMS/COMMENTS:
		COURTNEY HOOVER , friend of mother, is petitioner and requests appointment as guardian of the person of Mikko Padilla only.	This petition is as to <u>Mikko</u> only.
		See petition for details.	Please see competing petition filed by Christina Padilla (as to Mikko) on page 14B.
Cont. from			Petitioner: 7. Need Notice of Hearing. 8. Need proof of personal service 15 days before hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consent and waiver of notice for: a. Robert Campos (father) – <i>unless court dispenses with notice</i> 9. Need proof of mailed service 15 days before hearing of <i>Notice of Hearing</i> with copy of petition <u>or</u> consents and waivers of notice <u>or</u> declarations of due diligence for: a. Paternal grandfather b. Paternal grandmother
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input type="checkbox"/>	Notice of Hrg	<input checked="" type="checkbox"/>	
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<input type="checkbox"/>	Video Receipt		
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<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
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<input type="checkbox"/>	Status Rpt		
<input checked="" type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		
			Reviewed by: SEF
			Reviewed on: 7/7/2016
			Updates:
			Recommendation:
			File 14C- Amezcua/Padilla/Chapel

14C

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 6/7/16:</u> Examiner notes provided in open court. The Court will address the issue of the mother residing in the home of the petitioner at the hearing on 7/12/16. <u>Note:</u> It appears all service issues have now been cured.
Cont. from 042616, 060716				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skC	
			Reviewed on: 7/5/16	
			Updates:	
			Recommendation:	
			File 15- Robles	

Petitioner Newman, Kristie Leigh (Pro Per – Maternal Grandmother – Petitioner)

Petitioner Newman, Roger Dale (Pro Per – Maternal Grandfather – Petitioner)

Petition for Appointment of Guardian of the Person

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
N/A	Notice of Hrg			
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 7/6/16	
			Updates:	
			Recommendation:	
			File 16- Newman	

17 Amelia Molina, Isabella Molina, Richard Molina, III, and
David Molina (GUARD/P) Case No. 16CEPR00493

Petitioner Theresa Molina (Pro Per, paternal grandmother)

Petition for Appointment of Guardian of the Person

NO TEMPORARY REQUESTED			NEEDS/PROBLEMS/COMMENTS:
<p>THERESA MOLINA, paternal grandmother, is Petitioner.</p> <p align="center"><i>~Please see Petition for details~</i></p> <p>Court Investigator's Report was filed on 7/5/2016.</p>			
Cont. from			<p>1. Need proof of service by mail of the Notice of Hearing with a copy of the Petition for Appointment of Guardian, or Consent to Appointment of Guardian and Waiver of Notice, or a Declaration of Due Diligence, for:</p> <ul style="list-style-type: none"> Sierra Denney, sibling over age 12.
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W/	
	Aff.Pub.		
	Sp.Ntc.		
✓	Pers.Serv.		
✓	Conf. Screen		
✓	Letters		
✓	Duties/Supp		
	Objections		
	Video Receipt		
✓	CI Report		
	Clearances	X	
✓	Order		
	Aff. Posting		
	Status Rpt		
✓	UCCJEA		
	Citation		
	FTB Notice		
Reviewed by: LEG			
Reviewed on: 7/6/16			
Updates:			
Recommendation:			
File 17- Molina			

18 The C & S Tsitouris Family Trust dated August 22, 2009 Case No. 16CEPR00512

Attorney

Dostalova-Busick, Alice M. (for Petitioner Sandra Tsitouris)

**Petition for Instructions and to Confirm the Revocability and Amendability of the
C & S Tsitouris Family Trust**

Constantine Tsitouris DOD: 7/24/15		SANDRA TSITOURIS , Sole Surviving Trust Maker, Trustee and Beneficiary, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Petitioner states she and her spouse Constantine Tsitouris created the C&S Tsitouris Family Trust on 8/22/09 (Trust Makers). There have been no modifications or amendments to date. See Exhibit A. Upon his death, Petitioner became the sole trustee and beneficiary.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
		In order to properly administer the trust, Petitioner requests the Court confirm that the trust is a single trust for the benefit of the surviving Trust Maker and is fully revocable and amendable by the sole surviving Trust Maker.	
		Petitioner states she has personal knowledge of the Trust Makers' joint intention in creating the trust. In particular, they created the trust to avoid the necessity of probate following each of their deaths. As such, they created a revocable trust which they believed was for their benefit during each of their lifetimes and would facilitate the transfer of assets without probate. Thus, it was the Trust Makers' understanding and intent that the trust assets would continue in a single or survivor's trust for the sole benefit of the surviving Trust Maker during his or her lifetime.	
		Upon Constantine's death on 7/24/15, Petitioner sought the assistance of legal counsel to administer the trust. It was at this time that she discovered that the trust did not provide any administrative instructions following the first death. This drafter's error occurred because the Trust Makers created the document themselves without advice of legal counsel or other professionals. Nevertheless, taking the trust instrument as a whole, it is clear on its face that the Trust Makers created a trust that was amendable and revocable by each of them during each of their lifetimes, and that the trust assets were to remain in a single survivor's trust for the sole benefit of the surviving Trust Maker.	
		SEE ADDITIONAL PAGES	
			Reviewed by: skc
			Reviewed on: 7/6/16
			Updates: 7/7/16, 7/11/16
			Recommendation:
			File 18- Tsitouris

Section Three of the Trust states: "THIRD: RESERVATION AND GRANT OF RIGHTS AND PRIVILEGES. The Trust Makers specifically reserve and grant the following rights and privileges: A. During the lifetime of the Trust Makers, this trust may be altered, amended, or revoked in whole or in part...." (Trust Agreement, p. 1).

The express language of the trust states that during their lifetimes, and Sandra is still living, the trust may be altered, amended, or revoked. Moreover, the law states that unless a trust is expressly made irrevocable by the trust instrument, the trust is revocable by the settlor (Probate Code § 15400). That is the case here where there is no express statement in the trust document that any portion becomes irrevocable at the first Trust Maker's death.

Thus, based on the foregoing, Sandra is requesting the Court to confirm that the Trust is revocable and amendable by her as the surviving Trust Maker, and is for her sole benefit during her lifetime, as was contemplated and intended by the Trust Makers when the Trust was created.

The law recognizes the Court's equitable power to address a drafter's error and reform the instrument so as to conform to the settlor's intentions. See petition for citation. Here, the Trust Makers created a Trust document. They did not seek assistance of professionals and as a result the typical administrative provisions found in trusts following the first Trust Maker's death are missing. Petitioner is now requesting the Court's assistance to correct the drafting error and confirm the Trust Makers' intent that the trust is a single, survivor's trust that is for Petitioner's sole benefit during her lifetime, and that she retains all of the rights and powers to amend and revoke the trust.

Petitioner is the sole beneficiary during her lifetime. Following her death, Sandra and Constantine's children are contingent remainder beneficiaries. Petitioner lists the names and addresses of the persons entitled to notice as: Ambra and Jeffrey Wright of Magalia, CA (Petitioner's daughter and son-in-law), and Petitioner's step-sons Eric Tsitouris, of Port Orchard, WA, Joshua Tsitouris, incarcerated in San Luis, AZ, and Ethan Tsitouris, a minor, c/o Mary Jo Sterling, in Flagstaff, AZ.

Petitioner prays for an order:

1. Confirming that the trust is a single, survivor's trust;
2. Confirming that the trust is for Petitioner's sole benefit during her lifetime;
3. Confirming that Petitioner has the power to amend, revoke, or alter the trust in whole or in part;
and
4. For such other orders that the Court may deem proper.

Note: Declaration of Alice M. Dostalova-Busick filed 7/8/16 states venue is proper in Fresno because the trust account is principally located and managed with a financial advisor in Fresno. Additionally, Petitioner is in the process of relocating to Fresno, CA. Thus, the day to day activity of the trust is carried on by the trustee from Fresno.

Petition to Determine Succession to Real Property

DOD: 10/16/07		ESTHER YANEZ , daughter, is petitioner. 40 days since DOD. No other proceedings. Decedent died testate?/intestate? I & A - \$145,000.00 Petitioner requests Court determination that Decedent's 100% interest in real property located in Fresno passes to her pursuant to intestate succession .	NEEDS/PROBLEMS/COMMENTS: OFF CALENDAR. Amended Petition filed and set for hearing on 8/16/16. 1. #5 of the petition was not answered whether or not the decedent died testate or intestate. 2. Need date of death of deceased spouse. Local Rule 7.1.1D.										
Cont. from													
	Aff.Sub.Wit.												
✓	Verified												
✓	Inventory												
	PTC												
	Not.Cred.												
	Notice of Hrg	N/A	<table border="1"> <tr><td colspan="2">Reviewed by: KT</td></tr> <tr><td colspan="2">Reviewed on: 7/6/16</td></tr> <tr><td colspan="2">Updates: 7/8/16</td></tr> <tr><td colspan="2">Recommendation:</td></tr> <tr><td colspan="2">File 19- Yanez</td></tr> </table>	Reviewed by: KT		Reviewed on: 7/6/16		Updates: 7/8/16		Recommendation:		File 19- Yanez	
Reviewed by: KT													
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Recommendation:													
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	Status Rpt												
	UCCJEA												
	Citation												
	FTB Notice												

Petition to Determine Interest in Property

Ameliafrances Paul DOD: 5/14/15		CYNTHIA OLIPHANT , Co-Trustee, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Consent of Co-Trustee DONNA THERESA AMELIA MATTERN to the relief sought in the petition was filed on 6/28/16.	
		Petitioner states Ameliafrances Paul (the settlor) created the trust on 6/12/08. See Exhibit 1. The settlor died 5/14/15. Pursuant to Section 3.03 of the trust, upon the decedent's death, Petitioner and her sister became successor co-trustees.	
	Aff.Sub.Wit.		
✓	Verified		
	Inventory		
	PTC		
	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	W	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
<p>In Section 1.03(a) of the trust, the decedent provided that the property described in Schedule A is conveyed to the trustee. The decedent also executed a pour-over will, attached at Exhibit 2.</p> <p>Despite specifically referencing the real property on Mansionette in Fresno, title at the decedent's death remained vested in the decedent's individual name.</p> <p>With reference to Estate of Heggstad, Petitioner states it was decedent's intention that the Mansionette property be held, administered and distributed under the terms of the trust and Petitioner alleges that it is not subject to probate administration.</p> <p>Petitioner requests an order that:</p> <ol style="list-style-type: none"> 1. Ameliafrances Paul transferred the Mansionette Property to the trust by means of assignment; 2. Confirming Cynthia Oliphant and Donna Theresa Amelia Mattern as Co-Trustees of the Trust are the owners of the Mansionette Property; 3. Authorizing and directing Petitioner to execute any documents necessary to complete the conveyance or transfer of the property to the trustees; and 4. For all other orders the Court deems just and proper. 			<p>Reviewed by: skc</p> <p>Reviewed on: 7/6/16</p> <p>Updates: 7/11/16</p> <p>Recommendation:</p> <p>File 20- Paul</p>

21 Wanda Joyce Owens (CONS/PE)**Case No. 16CEPR00681**

Petitioner: Mark Owens (Pro per – Nephew)

Attorney: Deborah Boyette (court-appointed for Proposed Conservatee)

Petition for Appointment of Temporary Conservator of the Person and Estate**GENERAL HEARING 8/11/2016**

MARK OWENS, nephew, is petitioner and requests appointment as conservator of the person and estate without bond.

See petition for details.

NEEDS/PROBLEMS/COMMENTS:**Petitioner:**

1. Need proof of service of *Notice of Hearing* at least 5 days before the hearing on:
 - a. Garland Wood (brother)
2. Petitioner requests appointment of the estate with no bond. Probate Code 2320 states except as otherwise provided by statute, every person appointed as conservator shall, before letters are issued, give a bond approved by the Court.

Bond should be set at **\$32,732** (value of the personal property, annual income and cost of recovery. (Probate Code 2320 and California Rules of Court 7.207.)

Reviewed by: SEF
Reviewed on: 7/8/2016
Updates:
Recommendation:
File 21- Owens

Petitioner Rodriguez, Christina (Pro Per – Paternal Grandmother – Petitioner)

Status RE: Appointment of Temporary Guardian

		GENERAL HEARING CONT. TO 7/25/16	NEEDS/PROBLEMS/COMMENTS:
		CHRISTINA RODRIGUEZ , Paternal Grandmother, filed a Petition for Guardianship of the four minors on 4/12/16 that was heard on 6/13/16.	
		On 6/13/16, the Court set the matter for Status re Proof of ID on 6/20/16.	
Aff.Sub.Wit.		On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
Verified			
Inventory		On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
PTC			
Not.Cred.		On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
Notice of Hrg			
Aff.Mail		Minute Order 7/5/16 states: The Court Investigator is ordered to interview the parties again including Elissa (Maternal Grandmother). The Court is interested to know the recommendation on whether the guardianship should be granted or if the children should stay with Elissa. Also, when was the last time Christina (Paternal Grandmother/Petitioner) had visited with the children and for how long. The Court would also be interested in the status of Christina's minor son being in a gang. There are to be no visits with the mother at this time. The children may visit with Christina at Elissa's house for 2 hours on Wednesday and Friday from 11-1 unless parties can mutually agree on a different time.	
Aff.Pub.			
Sp.Ntc.		On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
Pers.Serv.			
Conf. Screen		Minute Order 7/5/16 states: The Court Investigator is ordered to interview the parties again including Elissa (Maternal Grandmother). The Court is interested to know the recommendation on whether the guardianship should be granted or if the children should stay with Elissa. Also, when was the last time Christina (Paternal Grandmother/Petitioner) had visited with the children and for how long. The Court would also be interested in the status of Christina's minor son being in a gang. There are to be no visits with the mother at this time. The children may visit with Christina at Elissa's house for 2 hours on Wednesday and Friday from 11-1 unless parties can mutually agree on a different time.	
Letters			
Duties/Supp		On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
Objections			
Video Receipt		On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
CI Report			
9202		On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
Order			
Aff. Posting		On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
Status Rpt			
UCCJEA		On 6/20/16, VALERIE SAINZ , Mother, was ordered to drug test immediately and the matter was continued to 7/5/16.	
Citation			
FTB Notice		<p>The Court set this hearing on 7/12/16 re appointment of a temporary guardian.</p> <p>Court Investigator filed a Supplemental Report on 7/7/16.</p> <p>Petitioner Christina Rodriguez filed additional declarations on 7/8/16.</p>	<p>Reviewed by: skc</p> <p>Reviewed on: 7/7/16</p> <p>Updates: 7/11/16</p> <p>Recommendation:</p> <p>File 22- Ortiz</p>

Attorney Nikole E. Cunningham (for Petitioners Jake Gallinetti and Kathryn Gallinetti)

Petition for Appointment of Temporary Conservator of the Person

		TEMPORARY GRANTED EX PARTE EXPIRES 7/12/2016	NEEDS/PROBLEMS/COMMENTS:
		<u>GENERAL HEARING SET FOR 8/10/2016</u>	1. Pursuant to Probate Code 2250.2(c), need proof of five (5) court days' notice by personal service of the <i>Notice of Hearing</i> and a copy of the <i>Petition for Appointment of Temporary Conservator</i> for:
Cont. from		JAKE GALLINETTI and KATHRYN GALLINETTI	
	Aff.Sub.Wit.	parents, are Petitioners.	• Sarah Gallinetti, proposed Conservatee, if Court does not excuse notice as Petitioners request.
✓	Verified		
	Inventory		2. Pursuant to the <i>Order on Ex Parte Application for Good Cause Exception to Notice</i> filed 7/1/2016, need proof of five (5) court days service by mail of the <i>Notice of Hearing</i> and a copy of the <i>Petition for Appointment of Temporary Conservator</i> for:
	PTC		
	Not.Cred.		• Central Valley Regional Center (CVRC).
	Notice of Hrg	X	
	Aff.Mail	X	~Please see additional page~
	Aff.Pub.		
	Sp.Ntc.		Reviewed by: LEG
	Pers.Serv.	X	
✓	Conf. Screen		Reviewed on: 7/6/16
	Letters	X	Updates: 7/8/16
✓	Duties/Supp		Recommendation:
	Objections		File 23- Gallinetti
	Video Receipt		
✓	CI Report		
	9202		
	Order	X	
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

JAKE GALLINETTI and KATHRYN GALLINETTI
parents, are Petitioners.

~Please see Petition for details~

Court Investigator's Report was filed
7/7/2016.

NEEDS/PROBLEMS/COMMENTS:

- Pursuant to Probate Code 2250.2(c), need proof of five (5) court days' notice by personal service of the *Notice of Hearing* and a copy of the *Petition for Appointment of Temporary Conservator* for:
 - Sarah Gallinetti, proposed Conservatee, if Court does not excuse notice as Petitioners request.
- Pursuant to the *Order on Ex Parte Application for Good Cause Exception to Notice* filed 7/1/2016, need proof of five (5) court days service by mail of the *Notice of Hearing* and a copy of the *Petition for Appointment of Temporary Conservator* for:
 - Central Valley Regional Center (CVRC).

~Please see additional page~

Reviewed by: LEG

Reviewed on: 7/6/16

Updates: 7/8/16

Recommendation:

File 23- Gallinetti

NEEDS/PROBLEMS/COMMENTS, continued:

3. Item 14 of *Confidential Conservator Screening* form filed 6/30/2016 for both Petitioners does not include explanation in Attachment 14 as required.
4. Need proposed order and proposed letters, as those previously submitted were used to grant the temporary petition ex parte.